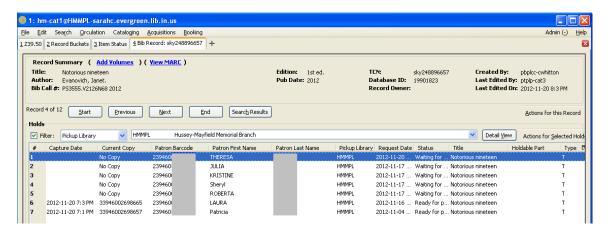
Chapter 21 -- Holds

Viewing Holds

To view holds for a catalog record, open the record and click on **Actions for this Record (Alt +A)**, select **View Holds (Alt + S)**. You can do this from any record view.



The View Holds screen opens:



TIP: If you have placed a hold on a record and it is not displaying you can reset the display. See page 21.13 for instructions.

NOTE: There are many holds related actions in the Actions for Selected Holds menu. This chapter focuses on those likely to be used by Catalogers.

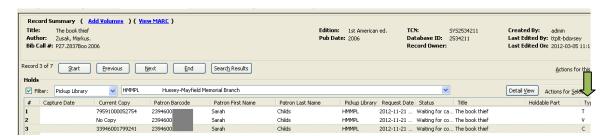
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By default the view is limited to holds designated for pickup at your library. You can view all holds by clicking the Filter box to remove the green arrow, and you can use the drop down lists to change the filters to Requesting Library or a different library.



The View Holds screen is a columned screen so you can also use the Column Picker to adjust the display as needed. See *Chapter 4 – Using the Column Picker*, if needed.

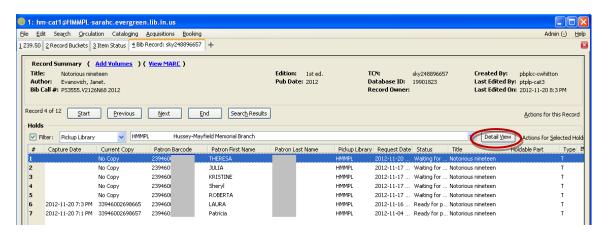
You can see a variety of information about the holds, including the type of hold. This is indicated in the Type column by the letters T, V, and C. These indicate Title, Volume and Copy holds.



Below you can see a Part hold with the part listed in the Holdable Part column.

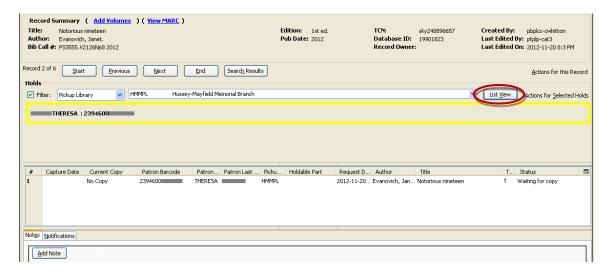


You can also look at selected hold in Detail View. Highlight the hold you wish to see, and then click the **Detail View (Alt + V)** button.



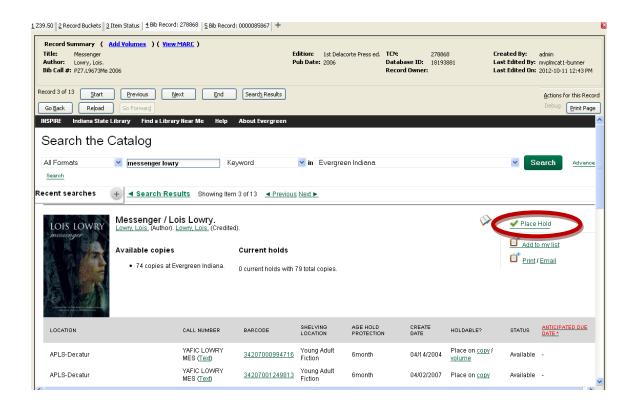
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To return to the List View, click List View (Alt + V).



Placing Title Level Holds

To place a hold, you need to be in OPAC view of the record you wish to place a hold on, as seen below. To go to OPAC view, click **Actions for this Record (Alt + R)**, select **OPAC view**. Then click **Place Hold.**



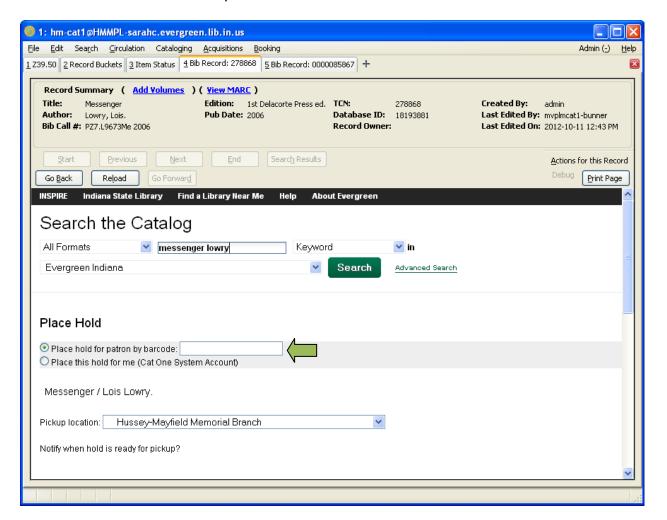
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Chapter 21 – Holds

Holds placed by clicking this button will be title level holds. Any eligible copy attached to the record can fill the hold.

The Place Hold Screen will open:



Click on the box labeled "Place hold for patron by barcode," then type, scan or paste the patron barcode for the person for whom you are placing

TIP: You have to click on the box because the cursor will be in the Search the Catalog box above.

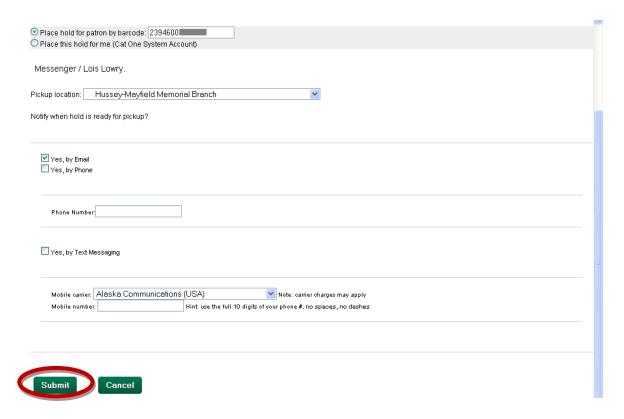
NOTE: If you scan the barcode or hit enter, the hold will be placed and you will not have to click submit.

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If you type or paste the barcode number into the box, the patron's contact preferences will be displayed.

NOTE: If they have a phone number on file, it will display even if they have not chosen to be contacted by phone. If they have no mobile information entered, Alaska Communications will display be default

You can change the contact preferences for this hold at this point, if desired. Then click **Submit**.



If the hold succeeds, "Hold was successfully placed" will display:

Place Hold Messenger / Lois Lowry. Hold was successfully placed Continue

To return to the OPAC view, click Continue.

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If the hold fails, "Hold was not successfully placed will display," and the reason will be listed. You may be given the opportunity to override, or you can cancel the hold at this point.



Place Hold

Messenger / Lois Lowry.

Hold was not successfully placed

Problem: User already has an open hold on the selected item.

You have permission to override some of the failed holds. Click Submit to override and place your hold on the selected items.



Cancel

Placing Holds on Monographic Parts

Holds are on Monographic Parts are made like title holds, but the when a record has monographic parts attached, you can are given the option of selecting the part on which to place the hold.

The advantage to placing a Part Hold rather than a Volume hold for item types that circulate between libraries, is that if multiple libraries have applied the same parts to their items, any of the items with this part applied can fill the hold. For example the hold could be filled by Part 1 from Greenwood or Part 1 from Zionsville, whereas with a volume or copy hold, only the part from that library can fill the hold.

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Open the record in OPAC view and click Place Hold.



When the Place Hold screen opens, if parts are attached, the parts drop-down list will appear. Enter the barcode, then select a part, and click **Submit** as usual.

Place Hold

Place hold for patron by barcode: 23946000312881 Place this hold for me (Cat One System Account)	
Drums of autumn [sound recording] / by Diana Gabaldon. Select a Part: Part 1, Discs 1-20 Part 1, Discs 1-20 Part 2, Discs 21-39 First Part 2, Discs 21-39	
Notify when hold is ready for pickup?	
✓ Yes, by Email ☐ Yes, by Phone	
Phone Number: 317-298-7888	

NOTE: If you do not select a part, the first part listed will automatically be selected.

NOTE: Holds on monographic parts can also be placed by patrons from the OPAC.

For more information on Monographic Parts, see **Chapter 25 – Monographic Parts.**

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Placing Copy and Volume Level Holds

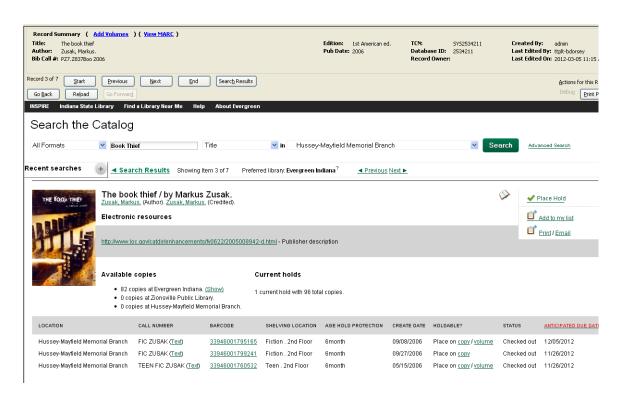
Copy level holds are holds on a specific copy. Only the copy with that barcode will fill your hold. These are useful when you need to check cataloging information or condition of a particular copy.

Volume level holds are holds placed on a specific call number. Any item with that call number from that library can fill the hold. These are useful for particular magazine issues or when a work has multiple volumes and no monographic parts have been applied.

NOTE: Copy and Volume Level holds can only be placed from the Staff Client. Patrons cannot place copy and volume level holds. If you want patrons to be able to choose a particular volume when placing holds from the OPAC, monographic parts must be used. See **Chapter 25 – Monographic Parts**.

To place a copy or volume level hold, you need to be in OPAC view of the record you wish to place a hold on, as seen below. To go to OPAC view, click **Actions** for this Record (Alt + R), select OPAC view.

TIP: If you want to place a hold on copies or volumes at your library, when you search the catalog, you may find it easier to limit the search to your library so that only your copies will be displayed, as seen below.



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To place a hold on a particular volume or copy or volume, do not use the Place Hold link.

Instead, in the copy details you will use the links in the Holdable? column.



To place a copy hold, click the desired **copy** link. Only the copy with that call number will fill your hold.



Proceed just as you would for a record level hold. See *Placing Holds* on page 21.2, if needed.

In Evergreen, separate call numbers are considered separate volumes. In the example, the library has two copies attached to one call number, and one copy attached to another call number. In the display, only the first copy with a given call number will have the volume link, but the hold can be filled by any of the copies with that call number.

To place a volume hold, click the desired **volume** link.



Proceed just as you would for a record level hold. See *Placing Holds* on page 21.2, if needed.

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Transferring Holds

The transfer holds function allows you to easily move holds from one bibliographic record to another.

This might be necessary for several reasons. Examples include: if you have replaced a lost or damaged item with different edition which belongs on another record, if you have accidentally placed a hold on the wrong record, if items and holds have been migrated or merged to the wrong record, etc.

To transfer holds from one item to another, open the record you need to transfer the hold(s) from in one tab and the record you need to transfer the hold(s) to in another tab.

First, click on the tab to view the record where you want the holds to be. In this case we're transferring holds from a print edition to an audiobook record.

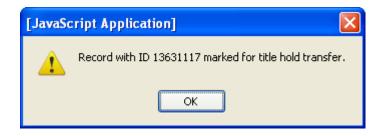
Click on Actions for this Record (Alt +A). Select Mark as Title Hold Destination.

1 Z39.50 2 Record Buckets 3 Item Status 4 Bib Record: SYS2534211 5 Bib Record: rcb00000446 + Record Summary (Add Volumes) (View MARC) Edition: The book thief rcb00000446 Created By: admin Author: Zusak, Markus. Pub Date: 2006 Database ID: 13631117 Last Edited By: btplb-mmellencamp Bib Call #: PZ7.Z837Boo 2006b Record Owner: Last Edited On: 2012-03-13 10:55 AM Record 1 of 148 Start Previous Next Search Results Actions for this Record Options OPAC View MARC View Stack subfields Flat-Text Editor Fast Item Add MARC Edit Call Number Item Barcode Holdings Maintenance Manage Conjoined Items MARC Record Manage Parts Bibliographic sou Fixed Fields -- Record type: REC View Holds Type i ELvl K Srce d Audn d View/Place Orders Ctrl Lang eng MRec BLvi m Ctry nyu Add to Bucket Desc a DtSt Date1 2006 Date2 Mark for Overlay TrAr n Part n LTxt FMus n AccM Comp Delete Record <u>U</u>ndelete Record LDR 01883cim a2200493Ka 4500 13631117 001 EG-IN 003 20120313145544.0 005 Transfer All Title Holds 007 sd fungnnmmned Mark as Target for Conjoined Items 061031s2006 nyu nnd

It does not matter what record view is displayed when you mark the title.

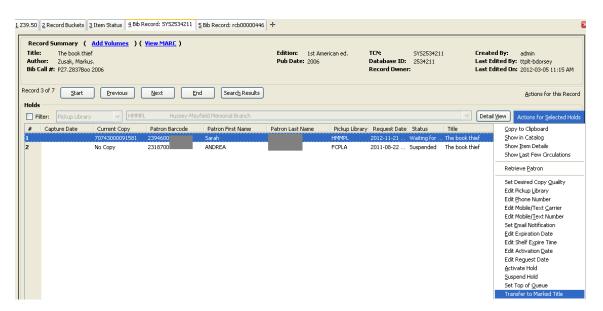
A dialog box will open telling you the record is marked for title hold transfer:

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Next, click on the tab to view the record where the hold you want to transfer is. It's best to be in holds view for this step, so you can select the holds you wish to transfer.

Click on the hold you wish to transfer to highlight it. You can also select certain holds by pressing the Shift key and clicking and dragging to select a group of holds, or pressing the control key as you click each individual hold you wish to select.

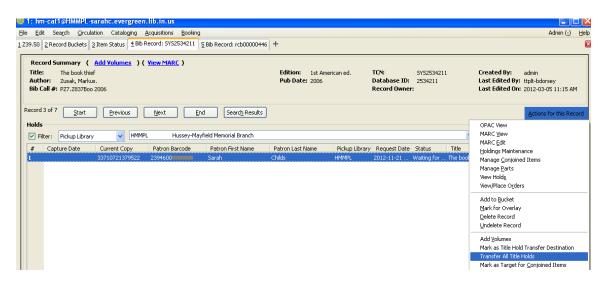


Once the holds you wish to transfer are highlighted, click **Actions for Selected Holds (Alt + S)** or right-click and select **Transfer to Marked Title.**

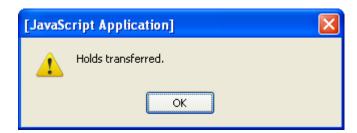
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Or, you can also transfer all title holds for that record by clicking on **Actions for this Record (Alt + A)**, and choosing **Transfer All Title Holds**.

NOTE: This will transfer ALL title holds on this record, not just those for your library.



With either method, a dialog box that says "Holds transferred" will open.

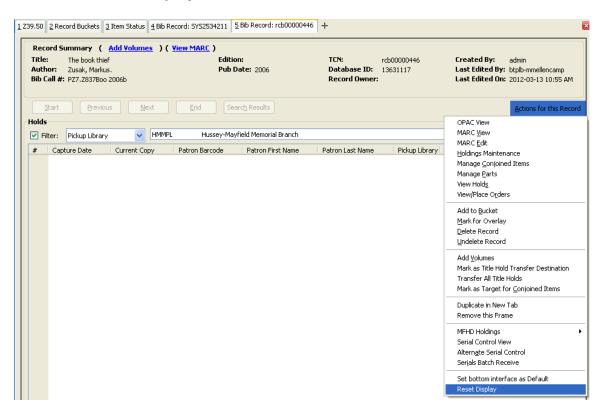


Click **OK** or press Enter.

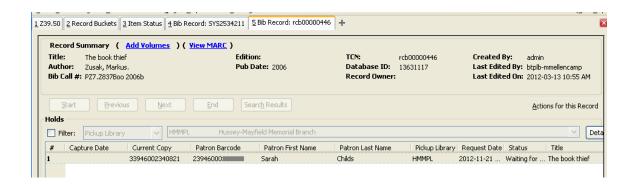
The holds will be transferred. The display will refresh and the holds you transferred will no longer be displayed for that record.

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To view the holds on the record where they have been transferred, click on the tab with the record that was the title hold destination. Likely the holds will not yet be displayed. To refresh the screen, click on **Actions for this Record (Alt + R)** and select **Reset Display**.



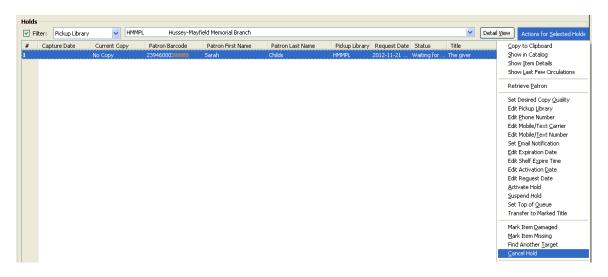
This will reload the record in your default record view. To return to View Holds, click on **Actions for this Record (Alt + R)**, and select **View Holds (Alt + S)**. The holds you transferred will now be displayed:



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Canceling Holds

To cancel a hold, view the holds for the desired bibliographic record. See *Viewing Holds* on page 21.1, if needed. Highlight the hold you need to cancel. Click **Actions for Selected Holds (Alt + S).** Select **Cancel Hold (Alt + C).**



A dialog box will open where you can enter the reason for canceling the hold, if desired. The default is Staff forced. You can use the drop down box to select another reason and enter notes into the dialog box:

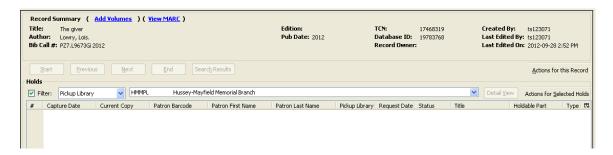
To cancel the hold, click **Apply (Alt +A)**.



NOTE: Clicking Cancel does not cancel the hold.

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The Hold will be canceled and the screen will refresh. The hold will no longer be displayed:



NOTE: If there are many holds on the record, this may not be very noticeable.

Retargeting Holds

Retargeting holds causes the system to check for another available copy to fill a hold.

The system checks at particular intervals to see if there are copies available to fill a hold. It does not check automatically when new copies are added or when some types of item status changes occur, for instance when an item is changed from On Order to In Process or when items marked as Damaged or Missing or set to other non-circulating statuses are once again made available for circulation. This means even if there are holds on the record, these items will go to reshelving, and the items can be checked out if found by patrons before the next system check for available copies.

You can prevent this by retargeting holds when items are added or status changes are made.

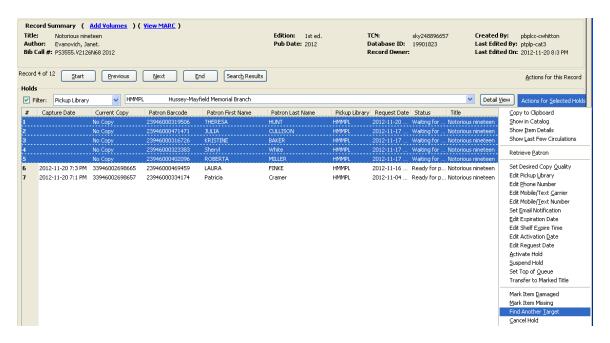
Another time to retarget a hold would be when an item to be pulled for a hold turns out to be damaged or missing. You can retarget the hold so the system will look for another copy to fill the hold.

To retarget holds, first open the record in Holds View. See *Viewing Holds*, on page 21.1, if needed.

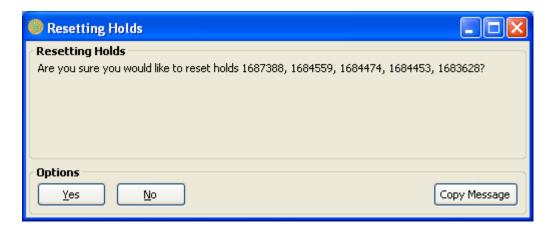
Then, highlight the holds you wish to retarget. If you are retargeting so the system will find holds for a newly available copy, highlight the holds which have a status of Waiting for Copy. If there are a lot of holds, it may be helpful to click on the head of the status column to sort the holds by Status.

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Under Actions for Selected Holds (Alt + S) select Find Another Target (Alt + T)



A window will open asking if you are sure you would like to reset the holds for these items:



Click **Yes (Alt + Y).** Nothing may appear to happen, or if you are retargeting a lot of holds at once, your screen may go blank or seem to freeze for a moment while the holds are retargeted. When the screen refreshes, the holds will be retargeted the system will now recognize the new items and items with a new status as available for holds

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